Creating a promotion

A **promotion** is a set of items with a special price: a discount, a free item or a gift. PizzaGest applies it by itself when the order meets the conditions, or lets the employee choose it.

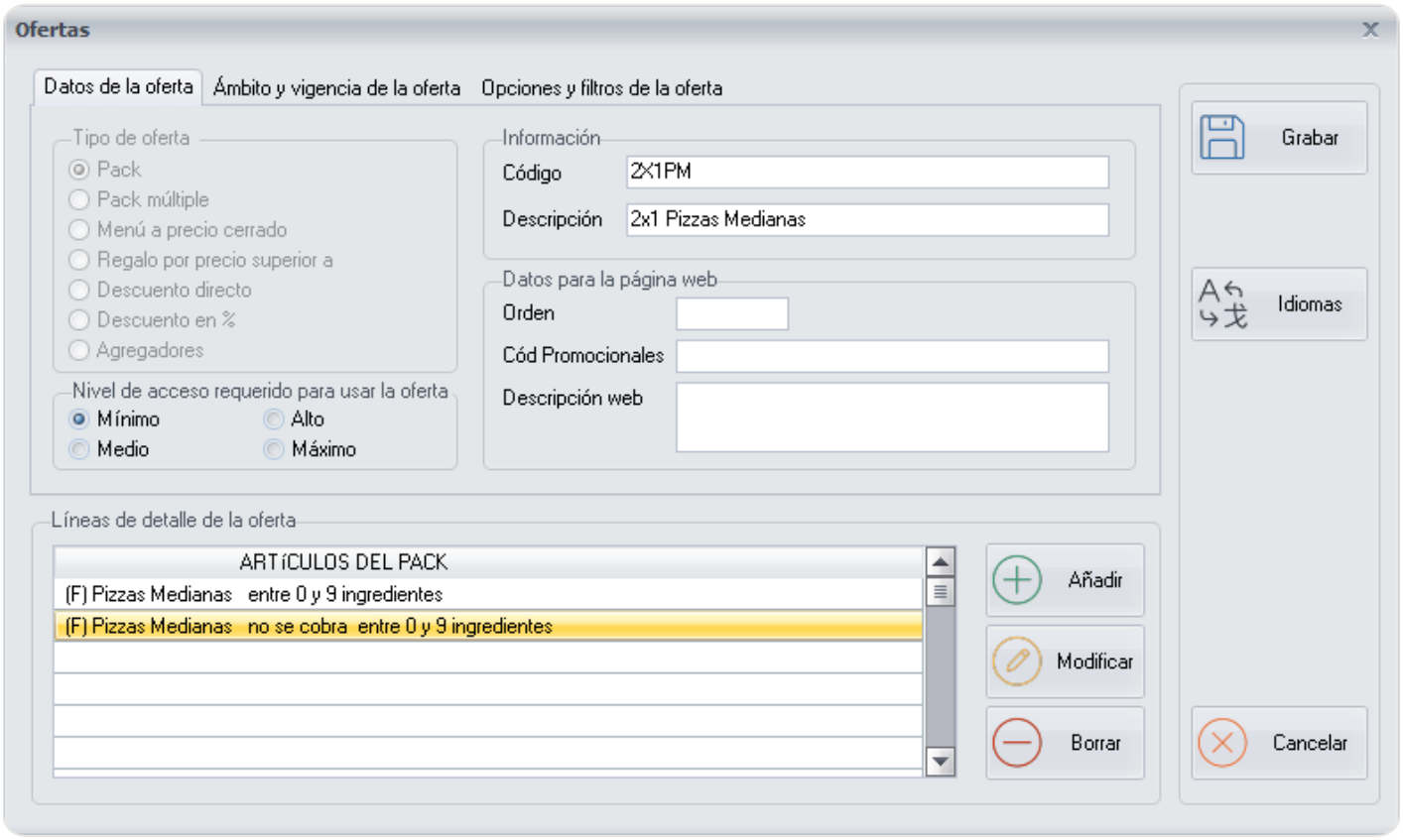
> **Example.** From Monday to Thursday, **2x1 on medium pizzas**: the customer takes two and pays for one.

The steps:

1. Create the promotion and choose its type.
2. Define the lines of the promotion.
3. Set when and where it applies.
4. Review the options.
5. Test it.

1. Create the promotion and choose its type

Go to **Items → Sales Promotions** and click **Add**. The screen has three tabs; start with **Promotion data**.



First choose the **Promotion type**:

Type	How it works	Example
Pack	It is applied when the order has **all** the lines of the promotion.	2x1; for every 2 pizzas, one at 50%
Multiple pack	Each line is an independent promotion.	50% discount for the staff
Fixed-price menu	Several items for a fixed price.	10 pizzas for 80 €
Gift for price higher than	A gift when the bill exceeds an amount.	A free drink on orders over 20 €
Direct discount	A fixed amount off the total.	5 € off for Black Friday
Discount in %	A percentage off the total.	50% on the customer's birthday

For our 2x1, choose **Pack** and fill in:

- **Code**: `2X1PM`.
- **Description**: `2x1 Medium Pizzas`. It is the text printed on the customer's ticket.
- **Access level required to use the promotion**: `Minimum`, so that any employee can apply it.

2. Define the lines of the promotion

The **detail lines** say which items there have to be in the order. A 2x1 is two lines: one pizza that is charged and another that is not.

Click **Add** next to the list of lines. The **Item selection wizard** opens and asks its questions screen by screen. The first thing is which items the line affects:

Item type	The line applies to…
Item	One or several specific items.
Family Group	All the items of one or several family groups.
Major Group	All the family groups of a major group: for example, pizzas of any size.

For the first line of our 2x1:

1. **Choose item type**: tick **Family Group**, select `Medium Pizzas` and add it with **Include element**. Click **Next**.

2. **Item exceptions** and **Ingredient exceptions**: they are for leaving some item or ingredient out of the promotion. Do not change anything and click **Next**.
3. **Min/Max ingredients**: how many ingredients the pizza can have to qualify for the promotion. Leave it from `0` to `9`.
4. **Gifts and discounts**: to the question **Must the item be charged?** answer yes, and to **Is a discount applied to the item?**, no.

Click **Finish** and repeat for the second line, the same as the first one but answering that the item **is not charged**.

The promotion ends up like this:

```
(F) Medium Pizzas   between 0 and 9 ingredients
(F) Medium Pizzas   not charged   between 0 and 9 ingredients
```

> **The order of the lines matters.** To apply the promotions, PizzaGest sorts the products of the order from the most expensive to the cheapest. That is why the line that is charged goes first: the customer pays for the most expensive pizza and the free one is the cheapest.

> **The second one at 50%.** It is the same promotion with one change: in the second line the item **is charged**, but you answer yes to **Is a discount applied to the item?** and, on the next screen, choose a percentage discount with value `50`.

All the screens of the wizard are in Item selection wizard.

3. Set when and where it applies

Go to the **Order type and validity of the promotion** tab.

- **Validity dates**: from when and until when. For a promotion with no end date, enter a date far in the future.
- **Order type**: which orders it is valid for (Dine-in, Delivery, Pick-up, Take-away…).
- **Source**: where it can be ordered from (Branch, Web, Call Center, Kiosk…).
- **Days of the week**: tick Monday to Thursday. You can also include or exclude public holidays and the days before them (public holidays are defined in the Public Holidays Calendar).
- **Schedule**: if the promotion is only valid at certain times, you can set up to two time slots.

4. Review the options

The **Options and filters of the promotion** tab holds the special conditions. The most used ones:

Option	What it does
The promotion can only be applied once per order	Even if they order four pizzas, only one is free.

Option	What it does
Promotion must be applied manually	The promotion is not applied by itself: the employee chooses it when charging.
It can only be applied once per customer	For welcome promotions.
The promotion is hidden on the web	It is not shown in the online store.
Minimum order amount to apply	The promotion is only valid from that amount upwards.

If you do not tick anything, the promotion is applied automatically, as many times as it fits in the order.

Click **Save**. All the options are in Add/Modify Promotions.

5. Test it

1. Open Orders and place a test order with two medium pizzas, on a day and with an order type for which the promotion is valid.
2. When you click **Charge**, the Applicable Promotions screen appears, with the promotion applied and the customer's **savings**.



3. If you sell online, run an Export to Web ticking **Export promotions**. For the promotion to appear on the website it must have the **Web** source ticked.

If the promotion is not applied

Check	Where
That today is within the dates, the days and the schedule.	**Order type and validity of the promotion** tab

Check	Where
That the order is of a ticked order type and source.	**Order type and validity of the promotion** tab
That **Promotion must be applied manually** is not ticked (in that case you have to choose it with **Choose promotion** when charging).	**Options and filters of the promotion** tab
That the pizzas do not have more ingredients than the maximum of the line.	Detail lines of the promotion
That your access level reaches the one the promotion requires.	**Promotion data** tab

PizzaGest never applies more than one promotion to the same product.

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